

Self-Assessment Checklist of Lister Office Duties

Use this checklist to help ensure you have addressed all necessary tasks.

Description of Task(s) by Category from "What a Lister Does" (FS-1149)	Listers <u>OR</u> Assessing Clerk	Assessor	Both	Other (name official)
KNOWLEDGE OF AREA REAL ESTATE MARKET				
A) Track active and sold listings				
B) Identify unique properties, neighborhoods, influences				
GENERAL GRAND LIST ANNUAL MAINTENANCE (includes but is not limited to)				
A) Assessment systems (grand list, CAMA, sketching, eCuse, myVTax)				
1) Check for system updates and perform backups as necessary				
2) Log in to eCuse and myVTax weekly, or as needed, for correspondence and tasks				
B) Property transfers and changes as of April 1				
1) Process transfers using deeds, surveys, tax maps, and Property Transfer Tax Returns				
2) Review inspection list and schedule visits with property owners				
3) Conduct site inspections and data collection				
a) Enter data into the grand list				
b) Enter data into CAMA and attach photo(s)				
c) Create or update sketch of structure(s)				



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4) Maintain list of tax map changes for updates				
5) Issue Change of Appraisal notices				
C) Review exemptions and special properties				
1) Exemptions				
a) Statutory and voted exemptions (dates, values, and proper statutory coding)				
b) Current Use exemptions in conjunction with the Current Use Division				
c) Veterans exemptions review and entry/removal				
2) Valuation of special properties (includes solar, wind, cell, covenant restricted, and subsidized housing, etc.)				
3) Update of annual utility inventories and valuation				
4) Commercial property valuation, if applicable				
5) Personal property valuation, if applicable				
D) Ongoing grand list maintenance				
1) Maintain weekly homestead and monthly Property Tax Credit reports				
a) Download/import file from the Vermont Department of Taxes				
b) Review of all reports for information and accuracy				
c) Amend CAMA to reflect business and rental usage as needed				
d) Send Listers Response to any questionable filing				
e) Issue Lister Certificate of Housesite Value upon request				
f) Prepare annual Homestead Non-Filers Report				

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2) Current Use withdrawals (value land withdrawn in CAMA, report in myVTax, notice to taxpayer)				
3) Maintain inspection list for properties needing visits (by permit or other means)				
4) Maintain / audit property categories (highest and best use)				
5) Errors and omissions administration				
a) Identify errors when they occur, present Errors and Omissions Certificate for approval				
b) If approved, amend assessment and send notice of change of appraisal/grievance hearings				
6) Scheduled submissions of grand list, 411s, and backups according to statute				
ASSESSMENT AND CURRENT USE GRIEVANCES, BCA APPEALS, AND STATE <u>OR</u> COURT APPEALS				
A) Grievance of assessment and Current Use allocations/withdrawals				
1) Schedule hearings and post warnings as prescribed by statute				
2) Research and compile comparable sales and evidence				
3) Hear testimony, attend site visits, and participate in discussions				
4) Revise assessments following site visits, if necessary				
5) Generate and distribute decisions according to statute				
B) Board of Civil Authority appeal of lister grievance				
1) Research and compile comparable sales and evidence				
2) Represent the listers' opinion of fair market value				
C) State Hearing Officer or Superior Court appeal of Board of Civil Authority Decision				
1) Research and compile comparable sales and evidence				
2) Represent the town's opinion of fair market value				

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GENERAL ADMINISTRATION AND MISCELLANEOUS DUTIES				
A) Establish regular daytime office hours for public access and records requests				
1) Maintain public records access by taxpayers, attorneys, title searchers, etc.				
2) Respond to requests and inquiries relating to valuation and processes				
B) Work closely with district advisor from the Vermont Department of Taxes on various tasks				
C) Tax bill administration				
1) Download state payment/property tax credits				
2) Print initial tax bills				
3) Print revised tax bills as needed				
D) Participate as a voting member of the Board of Abatement				
E) Submit Certificate of No Appeals Pending to the selectboard annually				
F) Attend trainings and conferences provided annually by PVR, your CAMA vendor, grand list vendor, VALA, VLCT, etc.				
EQUALIZATION STUDY				
A) Issue sale verification letters (as close to time of recording as possible)				
B) Process sales validation in the myVTax portal				
C) Work with district advisor to resolve issues that may arise and schedule an in-person review				
D) Review Annual Results of Equalization Study and reports				